

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2010 FINANCIAL DISCLOSURE STATEMENT

FORM A
For use by Members, officers, and employees

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HAND DELIVERED

K. Jacqueline Speier

(Full Name)

202-225-3531

(Daytime Telephone)

2012 APR 16 PM 5:48

(Office Use Only)

Filer Status: ☒ Member of the U.S. House of Representative State: CA District: 12

☐ Officer Or Employee Employing Office:

Report Type: ☐ Annual (May 15) ☒ Amendment

☐ Termination

Termination Date:

A \$200 penalty shall be assessed against anyone who files more than 30 days late.

PRELIMINARY INFORMATION -- ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period? If yes, complete and attach Schedule I.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)? If yes, complete and attach Schedule VI.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
II. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period? If yes, complete and attach Schedule II.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)? If yes, complete and attach Schedule VII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
III. Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$1,000 at the end of the period? If yes, complete and attach Schedule III.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year? If yes, complete and attach Schedule VIII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period? If yes, complete and attach Schedule IV.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule V.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.	

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

Trusts-- Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Exemptions-- Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

LEGISLATIVE RESOURCE CENTER

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name K. Jacqueline Speier

BLOCK A Asset and/or Income Source <small>Identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or sources of income which generated more than \$200 in "unearned" income during the year. Provide complete names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self-directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value for each asset held in the account that exceeds the reporting thresholds. For retirement accounts which are not self-directed, provide only the name of the institution holding the account and its value at the end of the reporting period. For rental or other real property held for investment, provide a complete address. For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); any derivative position; \$2,000 or less in a personal checking or</small>	BLOCK B Year-End Value of Asset <small>at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."</small>	BLOCK C Type of Income <small>Check all columns that apply. For retirement accounts that do not allow you to choose specific investments or that generate tax-deferred income (such as 401(k) plans or IRAs), you may check the "None" column. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income. Check "None" if the asset generated no income during the reporting period.</small>	BLOCK D Amount of Income <small>For retirement accounts that do not allow you to choose specific investments or that generate tax-deferred income (such as 401(k) plans or IRAs), you may check the "None" column. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income. Check "None" if no income was earned or generated.</small>	BLOCK E Transaction <small>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</small>
33 Park Road, #7 Burlingame, CA 94010	\$500,001 - \$1,000,000	RENT	\$15,001 - \$50,000	
4305 Auburn Blvd. Sacramento, CA 95814	\$1,000,001 - \$5,000,000	RENT	\$100,001 - \$1,000,000	
620 Stonegate Drive S. San Francisco, CA 94080	\$250,001 - \$500,000	RENT	\$15,001 - \$50,000	
730 Alhambra Sacramento, CA 95816	\$1,000,001 - \$5,000,000	RENT	\$50,001 - \$100,000	
SP American Century (IRA) Vista	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
SP Ameriprise (IRA) International Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	

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SP	Bank of America (Assets)	\$15,001 - \$50,000	INTEREST/INTE REST	\$201 - \$1,000		
SP	Charles Schwab - Black Diamond, formerly known as Clarus Corp Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
SP	Charles Schwab Anglogold Ashanti LT Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
SP	Charles Schwab Daytonabrands Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200		
	Charles Schwab Genentech, Inc. Stock	\$15,001 - \$50,000	None	NONE		
	Charles Schwab (Assets)	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
	Charles Schwab (IRA) Cisco Systems, Inc. Stock	\$1,001 - \$15,000	None	NONE		
	Charles Schwab (IRA) Hewlett-Packard Company Stock	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500		
	Charles Schwab (IRA) Hewlett-Packard Company Stock	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000		
	Charles Schwab (IRA) Schwab Money Market Fund	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000		
SP	Charles Schwab (Strategic) Schwab Money Market Fund	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500		
SP	Charles Schwab (Strategic) Dell Inc. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
DC	Charles Schwab (Trust) Advanced Micro Devices Stock	\$1,001 - \$15,000	None	NONE		

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DC	Charles Schwab (Trust) Alcatel Lucent ADR Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200		
DC	Charles Schwab (Trust) Comcast Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
DC	Charles Schwab (Trust) McKesson Corp. Stock	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200		
DC	Charles Schwab (Trust) Meadwestvao Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000		
DC	Charles Schwab (Trust) Microsoft Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
DC	Charles Schwab (Trust) Pac-West Telecomm, Inc. Stock	\$1 - \$1,000	None	NONE		
DC	Charles Schwab (Trust) Schwab Money Market Fund	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500		
DC	Charles Schwab (Trust) The Charles Schwab Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200		
DC	Charles Schwab (Trust) Walt Disney Co. Stock	\$15,001 - \$50,000	None	NONE		
	Charles Schwab Savings Plus (401k) Short-term Investment Fund	\$1,001 - \$15,000	DIVIDENDS	\$5,001 - \$15,000		
	Charles Schwab Savings Plus 401 (k) International Fund	\$15,001 - \$50,000	DIVIDENDS	\$5,001 - \$15,000		
	Charles Schwab Savings Plus 401 (k) Large Cap Fund	\$50,001 - \$100,000	DIVIDENDS	\$5,001 - \$15,000		
SP	Charles Schwab Amereco Stock	\$1 - \$1,000	None	NONE		

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SP	Charles Schwab Discovery Holding Co. Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab DWS Emerging Market Mutual	\$15,001 - \$50,000	DIVIDENDS	\$2,501 - \$5,000	
SP	Charles Schwab First Medical Group (IRA)	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Graham-Field Health, PR Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Healthsport Inc. Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Liberty Media Interactive Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Mphase Technologies, Inc. Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	

SP	Charles Schwab Schwab Value Money Market	\$250,001 - \$800,000	DIVIDENDS	\$1,001 - \$2,500	
SP	Charles Schwab Star Scientific, Inc. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Trimeddyne, Inc. Stock	\$1 - \$1,000	DIVIDENDS	\$201 - \$1,000	
SP	Charles Schwab Zap.com Corp Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Zapata Corp. Stock	\$1 - \$1,000	DIVIDENDS	\$201 - \$1,000	
	City Morgan Stanley Electronic Arts Stock	\$1,001 - \$15,000	None	NONE	
	City Morgan Stanley AOL Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	City National Bank Account	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	City National Bank Accounts	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
	Federal Thrift Savings Plan	\$50,001 - \$100,000	DIVIDENDS	\$1,001 - \$2,500	
DC	Fidelity - EDU CA Guaranteed Option Fund	\$50,001 - \$100,000	DIVIDENDS	\$1,001 - \$2,500	
SP	Gabelli Asset Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Gabelli Small Capital Growth	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	Med America 401 (k) - Retirement	\$250,001 - \$500,000	DIVIDENDS	\$5,001 - \$15,000	
	Nuveen California Ins Muni A Fund	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	
DC	PG&E Stock (one share)	\$1 - \$1,000	DIVIDENDS	\$1 - \$200 (\$4.00)	
	Red Wheel/Weiser/Conari - Book Agreement	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
SP	Schwab - Microsoft Stock	\$15,001 - \$50,000	None	NONE	
SP	Schwab INTEL Stock	\$15,001 - \$50,000	None	NONE	
SP	Schwab Seraph Parturus II Stock	\$15,001 - \$50,000	DIVIDENDS	NONE	
DC	Sterling Bank	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	

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	Sterling Bank	\$50,001 - \$100,000	INTEREST	\$201 - \$1,000	
	Sterling Bank - Speier Family Partners (Assets)	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	
SP	Strategic Investment Solutions Stock (CA)	\$1,000,001 - \$5,000,000	None	NONE	
	U.S. Bank - Speier Family Partners	\$50,001 - \$100,000	INTEREST	\$1 - \$200	
	US Bank Accounts	\$15,001 - \$50,000	INTEREST	\$201 - \$1,000	
SP	Vanguard (IRA) Explorer Fund Admiral	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
SP	Vanguard (IRA) Growth Equity Fund	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
SP	Vanguard (IRA) International Growth Adm Fund	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
SP	Vanguard (IRA) International Value Fund	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
SP	Vanguard (IRA) Windsor II Fund Adm	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
SP	Vanguard (IRA) Federal Money Market Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	VIRSYS - (Stock) (VA) Corp.	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	